



Portal Functions

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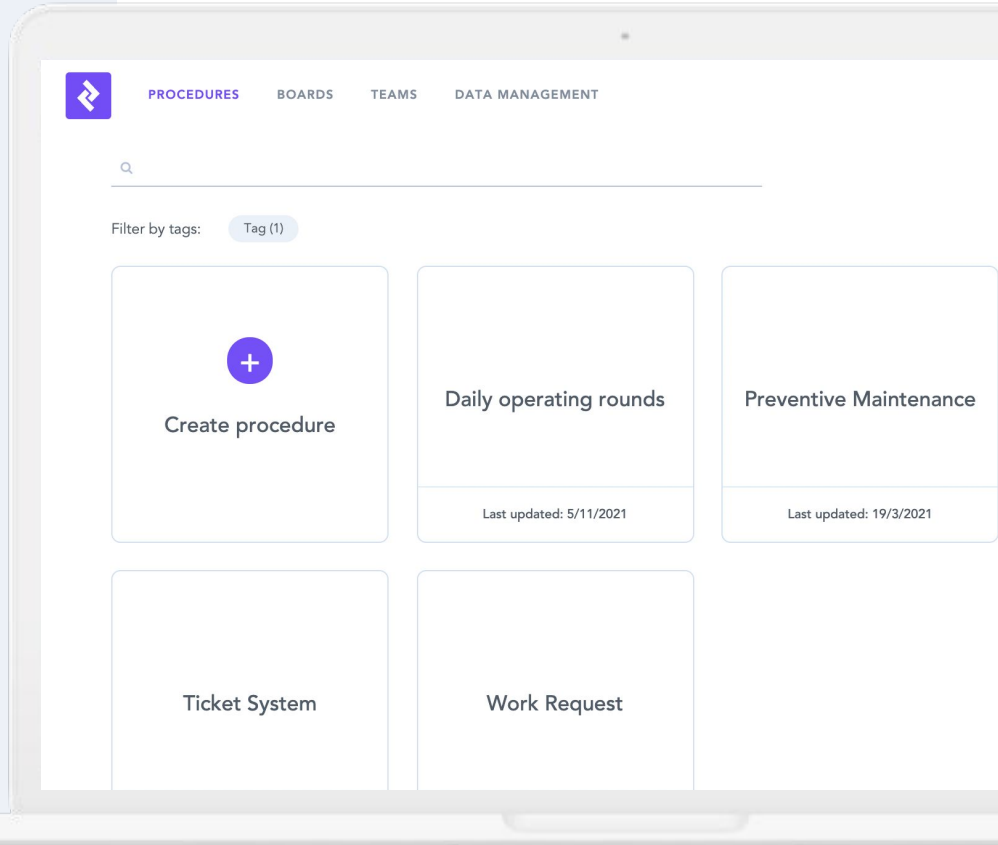
Portal Functions

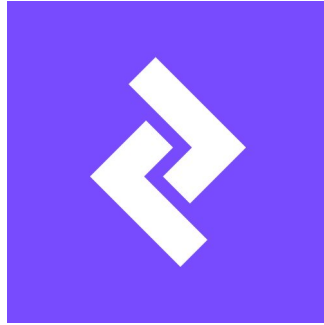
- Portal - general overview
- Procedures
- Boards
- Teams
- Data Management

Portal

Where :

- **Procedures** are created, maintained and distributed, and execution is tracked and visualized.
- **Boards** can be reviewed for high level visual understanding of data inputted.
- **Teams** can be created/ edited, and users invited to the Zaptic platform
- **Data Management** can be created to mirror the hierarchical structure of the shop floor.





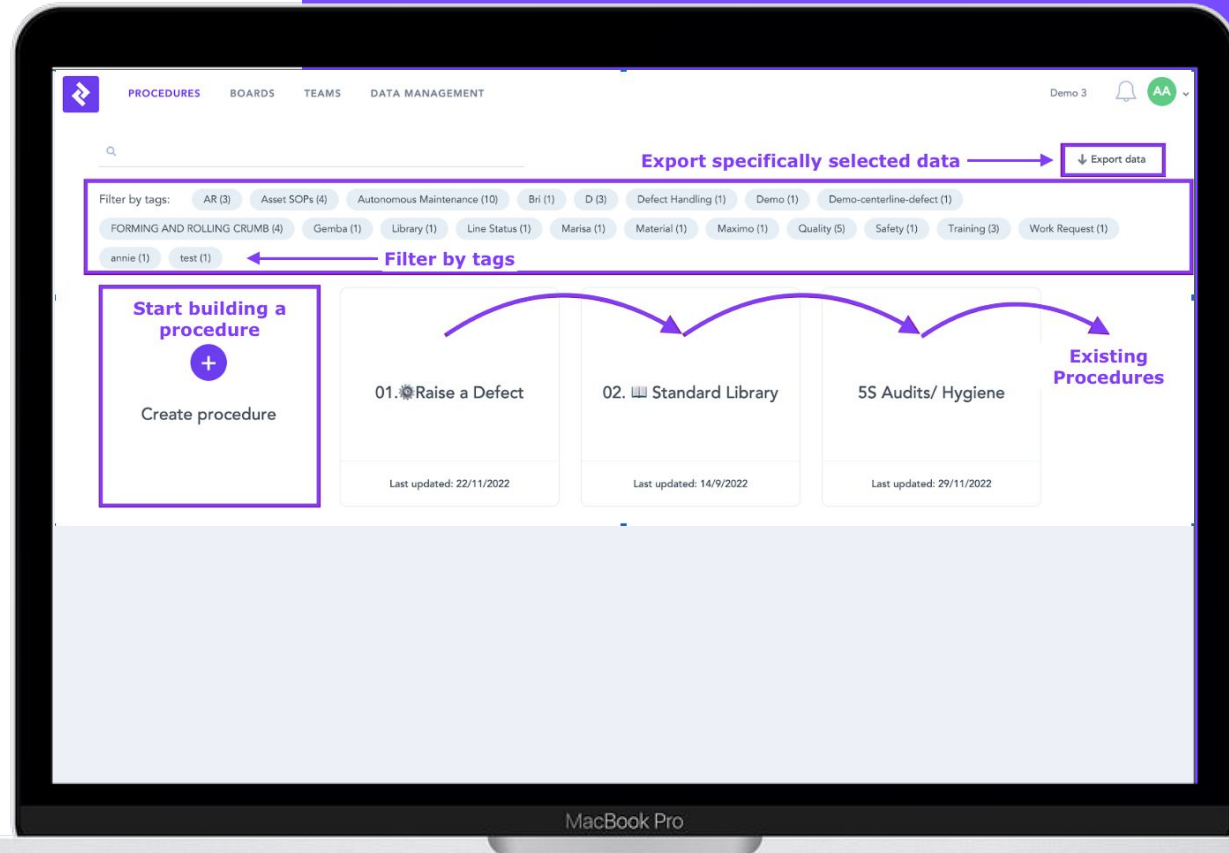
Procedures

Procedures

A folder-like structure to house related content and tasks.

In Procedures you can:

- Create a procedure
- Filter the procedure by tags
- Export data that has been generated in Zaptic.



1a. Procedure - Timeline

The screenshot displays the '5S Audits/ Hygiene' procedure page. The top navigation bar includes 'PROCEDURES', 'BOARDS', 'TEAMS', and 'DATA MANAGEMENT'. The '5S Audits/ Hygiene' title is highlighted with a purple box and labeled 'Procedure Name'. Below the title are tabs for 'Timeline', 'Tasks', 'Training', and 'Guides', with 'Timeline' selected. On the right, there are links for 'Manage Team Access' and 'Manage Collaborator Access', both pointing to a team management box containing icons for AR, EL, IC, JS, a '+10' button, and a '5 teams' button. The main content area features a 'Share an update about this procedure' section with a 'Post' button. Below this is a search bar and filter buttons for 'Recent events', 'Date', 'Event type', and 'Filter by collaborator'. The timeline shows two events: 'Staav Bremer added Jenna Shaver as a collaborator on this procedure' and 'Zach submitted a report'. A 'Collaborators' list on the right shows Adele Rodgers, Ethan Lowe, and Ian Chattaway. Annotations include a purple box around the 'ABOUT THIS PROCEDURE' section labeled 'Brief Description', a purple box around the 'Tags' section labeled 'Tags', and a purple box around the 'Collaborators' list labeled 'Collaborators'. A purple arrow points from the 'Timeline' tab to the timeline events, and another points from the 'Collaborators' list to the 'Collaborators' label.

Procedure Name

Manage Team Access

Manage Collaborator Access


Brief Description



Tags

Collaborators

Procedure Timeline

1b. Procedure - Task Page

PROCEDURES BOARDS TEAMS DATA MANAGEMENT

Demo 3  

5S Audits/ Hygiene

Timeline **Tasks** Training Guides

AR EL IC JS +10 5 teams






Tasks (1)

Add

5S Audit
Updated 4 months ago

List of Tasks created within the Procedure

Q Search Searchable by Name / ID

ID	REPORT TITLE	SUBMITTED BY	TIME	ACTIONS	SUBJECT	STATUS
List of reports submitted						
3582	5S Audit	 Richard Milnes	29/11/2022 9:02 PM	-	Line 1 (Area 2)	Complete
3019	5S Audit	 Richard Milnes	25/8/2022 12:48 PM	0 / 2	Line 2	Complete
3018	5S Audit	 Richard Milnes	21/7/2022 1:07 PM	-	Line 1 (Area 2)	
2974	5S Audit	 Jake Smith	18/7/2022 11:48 AM	-	Beer Brewing 1	
2880	5S Audit	 Richard Milnes	23/6/2022 3:47 PM	-	Line 1 (Area 2)	

Create Task

Task Name
Filler Weekly CIL

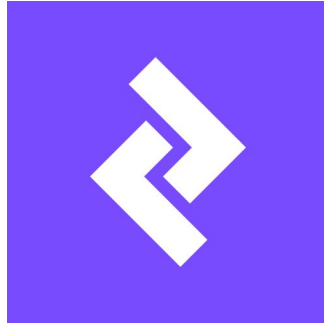
Flow type

Flow

Legacy Flow

Report Subject
Machine

Save and start flow



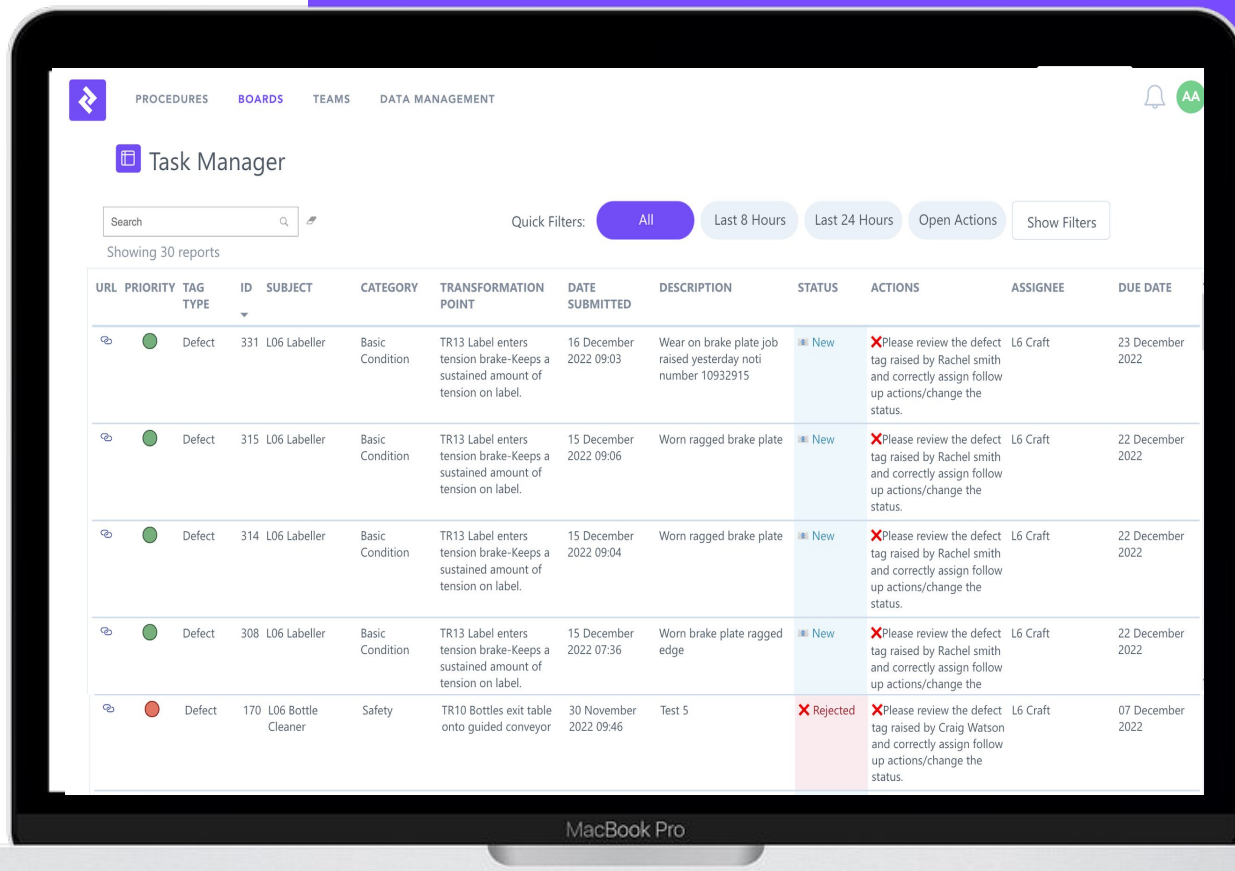
Boards

Boards

A visual aggregation of the data captured in Zaptic.

The task manager board enables issue and action tracking at a granular level and comes as a standard within Zaptic.

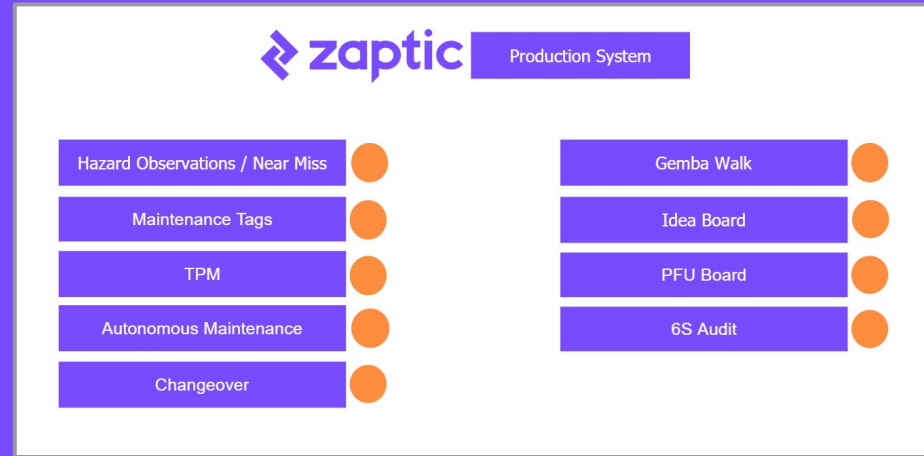
This board shows both specific and aggregated issue and action data and helps drive adherence



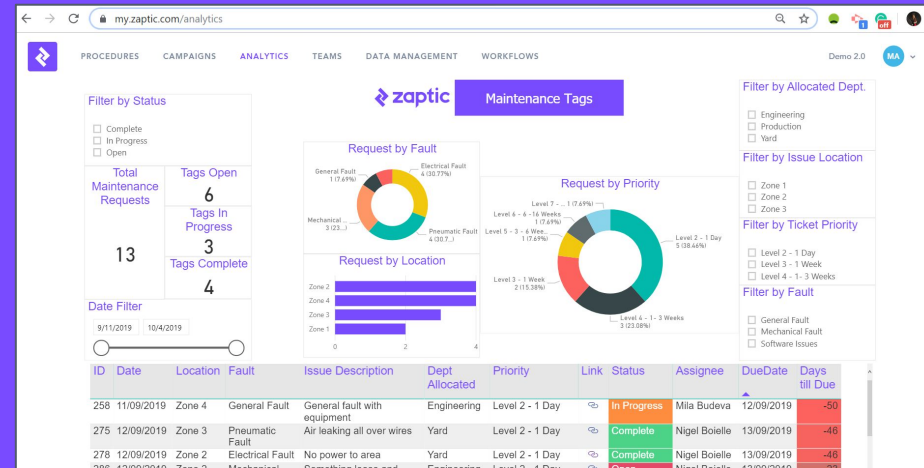
2a. Boards

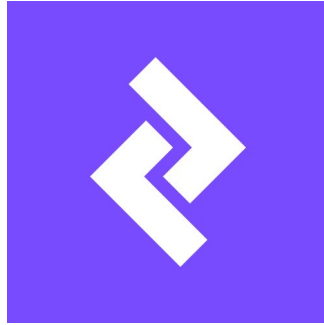
A way of analyzing data in charts and graphs to drive decision making on the shop floor.

Note: Only available for users granted "Boards" permission.



Example of an analytical dashboard





Teams

Teams

The place to view and manage users and teams in Zaptic.

In Teams you can :

- Change a user's permissions which includes granting them more or less access to different areas of the Zaptic software.
- Invite or re-invite users to Zaptic
- View training compliance on a team / user basis
- Download training compliance to excel
- Import users in bulk using a template



The screenshot shows the 'Teams' management interface in the Zaptic software. The interface includes a top navigation bar with 'PROCEDURES', 'BOARDS', 'TEAMS', and 'DATA MANAGEMENT'. Below this, there's a 'Demo 3' header and tabs for 'Company' and 'Teams'. A search bar is present, along with buttons for 'Invite New Users' and 'Bulk Upload Users'. The main content is a table listing users with columns for NAME, JOB TITLE, ZAPTIC ID, TEAMS, LAST SYNC, and STATUS. Four callout boxes provide details for specific users:

NAME	JOB TITLE	ZAPTIC ID	TEAMS	LAST SYNC	STATUS
Adele Rodgers adele@zaptic.com	Zaptic Staff	48	Technicians (Level 1)	2/12/2022 10:31 PM	ACTIVE
Andreea Anca andreea.anca@zaptic.com	Implementation Consultant	57	Site 1 Safety Leadership, +3	23/3/2023 4:08 PM	ACTIVE
Andreea Anca andreea_aai@yahoo.ro	lc	64	SuperUsers	Never	ACTIVE
Annie Nguyen annie@zaptic.com	Zaptic Staff	51		10/11/2022 5:05 PM	ACTIVE

Callout boxes for user details:

- User: Adele Rodgers (ID 48)**
 - Never
 - 15/10/2019 5:25 PM
 - The user never user Zaptic
 - Last time used Zaptic
- User: Andreea Anca (ID 64)**
 - INVITED
 - ACTIVE
 - The user never activated account
 - The user activated account

3a. Teams




[PROCEDURES](#)[BOARDS](#)[TEAMS](#)[DATA MANAGEMENT](#)

Demo 3

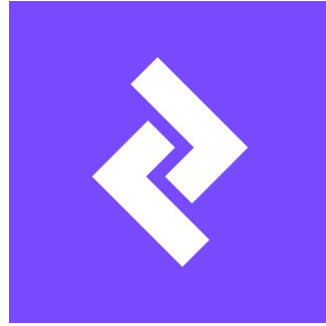


Demo 3

[User view](#)[Company](#)[Team view](#)[Teams](#)[Invite New Users](#)

NAME ▼	JOB TITLE ▼	ZAPTIC ID ▼	TEAMS	LAST SYNC ▼	STATUS ▼
 Adele Rodgers adele@zaptic.com	Zaptic Staff	48		2/12/2022 10:31 PM	ACTIVE
 Andreea Anca andreea.anca@zaptic.com	Implementation Consultant	57		18/11/2022 11:16 AM	ACTIVE
 Annie Nguyen annie@zaptic.com	Zaptic Staff	51		10/11/2022 5:36 PM	ACTIVE
 Ben Babic ben@zaptic.com	Developer	3		Never	ACTIVE
 Clare Lindley clare@zaptic.com	Developer	17		17/1/2022 11:44 AM	ACTIVE





Data Management

Data Management

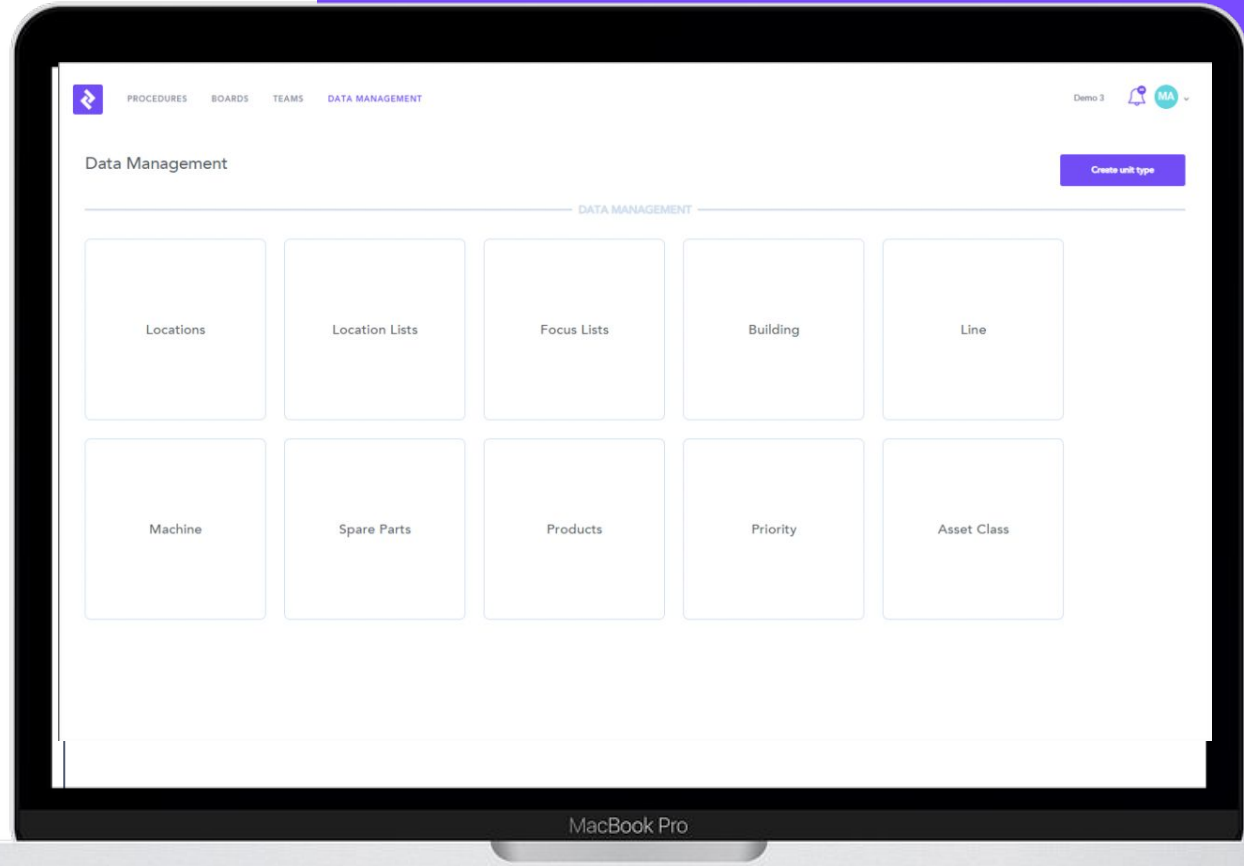
Where master data including equipment hierarchies is created and maintained.

In Data Management you can :

- Create new hierarchical relationships
- Add new assets/areas/lines to your existing hierarchy
- Store master data (for the Loop element)
- Apply barcode scanning and other data attributes to your units.

Units in Zaptic can be any item on the shop floor, i.e., a line, a machine, a department etc.

Units are stored in folders called unit types.

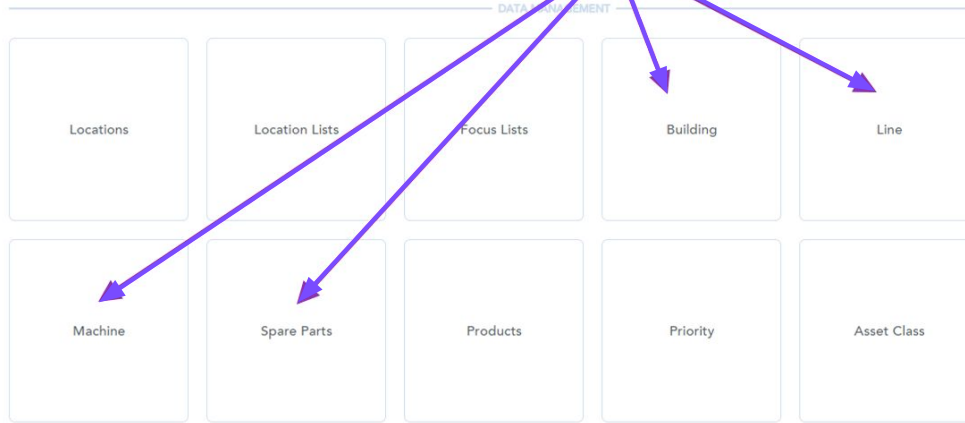


4a. Data Management



PROCEDURES BOARDS TEAMS DATA MANAGEMENT

Data Management



Demo 3



MA

Create unit type

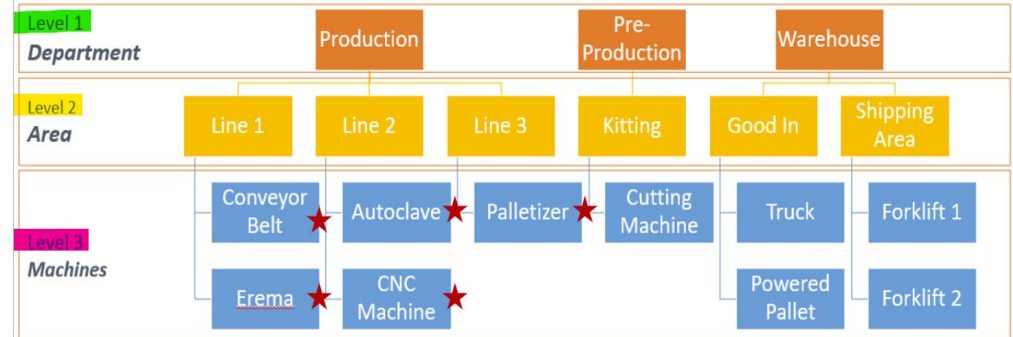
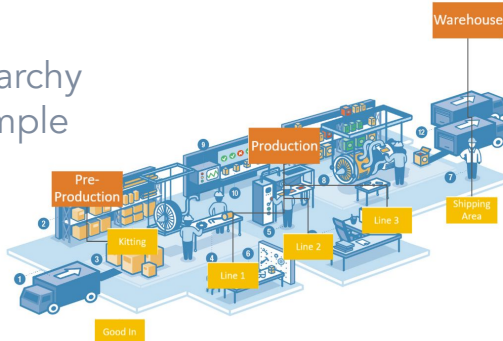
Create unit type

Name

Parents

Create unit type

Hierarchy Example



Objective

This course covered the Zaptic
Portal



What this course covered

1. Portal - A general overview
2. Procedures - the main features and pages
3. Boards - PBI and how board work
4. Teams - Inviting people to Zaptic and creating teams
5. Data Management - replicating the shop floor structure in Zaptic



Thank You

